**TECH AFRICA – STOCKS DATABASE**

**PRICE CHANGES MODULE – DESIGN BRIEF**

**Work-flow (Summary)**

* Change the exchange rates
* Produce the files needed
* Send out emails to the table of recipients
* PASTEL
  + Import prices into pastel
  + Delete old quotes or maybe update if possible
  + Update prices on job cards
  + Change pastel exchange rate where applicable
* Form for reps to print off a specific price list

**Functions / Working Parameters**

* Change the exchange rates – can be for -
  + the USD / ZWL change
  + The ZWL selling price re change in ZWL rate
  + Changes due to new stock items
* Produce the files needed
  + the USD / ZWL change
    - will just be the pastel file prices that needs to be produced
  + The ZWL selling price re change in ZWL rate
    - Pastel file
    - Customer update files in excel
    - ZWL price Lists
    - Emailed out as per the table
  + Changes due to new stock items
    - Pastel file
    - Customer update files in excel
    - ZWL AND USD price Lists
    - Emailed out as per the table
* Send out emails to the table of recipients
  + A table needs to be set up for this
    - Will also need an entry / maintenance form
    - Validations on this – if a customer is on retail, then price list to send must be the retail price only (need a report for just the retail prices)
      * All other price structures can have dealer and retail prices
  + The email variables need to be set
  + The system will need to send emails out in batches that don’t exceed the limit
* PASTEL
  + Import prices into pastel
    - Ideally, this would auto-update into pastel via SQL coding
    - But presently to export the csv file (this is done) that can be imported into pastel
  + Delete old quotes or maybe update if possible
    - May be able to create an excel VBA script for this to
      * Export the quotes
      * Lookup the new price and ROE
      * Makes changes and save as a csv
      * Delete the old quotes
      * Import the new csv file
  + Update prices on job cards
    - This one is tricky as can’t do same as quotes due to not being able to re-use document numbers and an import would change the job numbers
    - Only way would be to do via an SQL update
  + Change pastel exchange rate where applicable
    - Not sure if this can be done via SQL but changes would need to be for this month as well as all the preceding months

TO DO LIST

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| --- | --- | --- | --- |
| Type | Details |  |  |
| Report | Customer updates – will need to be an excel file for them, saved and emailed, as per their specs. There are 5 at present all needing their own parameters. |  |  |
| Table | Customers price list email listing |  |  |
| Table | Customer price updates – our code and their code, and the customer ID (3 Fields) |  |  |
| Report | The ZWL price list |  |  |
| Report | The USD price list. Have started this but it needs the old price field in it once the archive selling prices table is set up |  |  |
| Report | Price list for only the retail price |  |  |
| Table | Archive of selling prices |  |  |
| Form | Form started – to select the option of what type of price change it is |  |  |
| Form | For staff to select a price list to print. By product main group |  |  |
| Code | SQL coding to upload new prices into pastel and change the exchange rates in pastel where needed |  |  |
| Code | Update pastel exchange rate if possible via SQL |  |  |
| Code | Update selling prices and rates on quotes and job cards via SQL if possible or a VBA excel app for this |  |  |